

Introduction

The Need for This Curriculum

For decades, people with disabilities have struggled to overcome the assumption that they are patients needing care, rather than individuals who require assistance to live full and independent lives. One result of this struggle has been a shift in the way services are conceptualized and delivered. The medical model of patient care, in which all services are delivered under the expert care of licensed medical staff, is being replaced by a social model in which the expert is the consumer who is in charge of directing his or her own support services.

The kinds of assistance people need to live in the community vary but may include help with activities of daily living such as bathing, dressing, transferring from one position to another, using the toilet, and eating, or may focus on instrumental activities of daily living such as housekeeping, meal preparation, shopping, or laundry. These personal assistance services may be delivered through an agency, or consumers may hire and supervise personal assistants (PAs) directly. This consumer-directed model is becoming increasingly popular, particularly among young adults who want greater independence and control over their lives.

Although consumer-directed assistance is appealing to many people with disabilities, most have little or no experience as employers. This curriculum is intended to (a) familiarize participants with the consumer-directed model of personal assistance services; (b) introduce the steps involved in recruiting and hiring PAs; and (c) develop and strengthen the supervisory skills participants need to direct their own care and support and retain their PAs.

Being an employer is challenging in and of itself, but with consumer-directed services, a person with a disability is the consumer, employer, and supervisor. The integration of these three roles in a single individual makes consumer-directed services particularly complex; success requires a high degree of self-awareness as well as excellent interpersonal and communication skills. By attending one or more of the workshops in this series, consumers will be better able to sort out each of these critical roles, communicate more effectively, manage their emotional responses to difficult situations, and build positive relationships with their PAs.

Curriculum Goal

After completing this training, participants will be able to find, support, and effectively supervise personal assistance staff, and as a result, retain such staff over time.

Curriculum Objectives

After completing this training, participants will be able to:

- Describe the consumer-directed model and the rights and responsibilities that go with consumer-directed services.
- Identify their personal assistance needs and preferences.
- Place ads, screen, interview, and hire PAs who best match and support their needs and preferences.
- Communicate using active listening techniques, including asking open-ended questions and paraphrasing.
- Effectively supervise and support PAs, and manage challenging conversations and situations.

Target Audience and Settings

The interactive approach of this curriculum suggests that the minimum number of training participants should be five and the maximum twelve.

Consumers who will benefit from this curriculum include those who:

- Receive agency services and want to speak up more clearly and effectively regarding their needs and preferences
- Are actively exploring the consumer-directed option.
- Have been approved for consumer-directed service and are actively seeking employees.
- Have begun to direct their own services.

These four types of consumers have varying experiences with consumer supports and directed services, so their needs will be different. In addition, some consumers will be younger people (under 65) directing their own care, others may be older consumers, and still others may be family or friends directing care on behalf of someone needing services. Accordingly, the seven training sessions that comprise this curriculum can be structured as a single course or as four stand-alone workshops targeting the needs of different audiences (see Structure, below). The curriculum can be used in a variety of settings, such as independent living centers, fiscal intermediaries providing program oversight, managed long-term care programs, and Alzheimer support centers.

Structure

The curriculum is divided into seven training sessions:

- **Session 1: Living the Life You Want: Exploring Needs and Preferences** increases consumers' self-awareness of their personal assistance needs and preferences, and enhances their ability to speak up about them, in order to help them screen, hire, and supervise PAs more effectively.
- **Session 2: Understanding the Consumer-Directed Option: Is It Right for You?** helps participants explore the concepts of choice and preference and rights and responsibilities in obtaining personal assistance services for themselves.
- **Session 3: Finding Personal Assistant Candidates** develops the knowledge and skills trainees need to find appropriate candidates that will be able to meet their personal assistance needs and preferences.
- **Session 4: Preparing to Staff** gives participants the opportunity to develop a staffing plan and Personal Assistance schedule and to improve their interviewing skills.

- **Session 5: Hiring Personal Assistants** takes participants through the process of making an offer to the best candidate and turning down those who are not suitable for a specific position. This module also provides an overview of the consumer-directed program requirements.
- **Session 6: Introduction to Basic Supervisory Skills** introduces the role of supervision in the consumer-directed model and begins the process of developing basic supervisory skills by focusing on active listening.
- **Session 7: Supervisory Skills II: Self-Awareness, Self-Management, and Constructive Feedback** develops key skills essential to being an effective supervisor.

Consumers who wish to increase their ability to speak up on behalf of having their needs and preferences addressed may just want to take the first session. Consumers who are exploring the consumer-directed model or just beginning to direct their own care may be interested in taking all seven modules as a single course. Others, with more experience, may want to focus on specific skills such as recruiting and hiring assistants, or supervising their existing staff. To accommodate these varying needs, the curriculum can be structured as four stand-alone workshops:

- **Workshop I: Living the Life You Want: Exploring Your Needs and Preferences – Session 1** (4 hours, plus breaks). This workshop can be of value for all consumers – whether they choose to pursue self-determination or not. It focuses on assisting participants in exploring the characteristics of the life they wish to live, and identifying the supports they would need to live that life.
- **Workshop II: Introduction to the Consumer-Directed Model: Is It Right for You? —Session 2** (3 hours, 45 minutes, plus breaks): This session is designed for those actively exploring the consumer-directed option. It is designed to help participants gain a clearer understanding of what is involved in order to decide whether to pursue this option for themselves.
- **Workshop III: Finding & Hiring Personal Assistants—Sessions 3, 4 & 5** (12 hours, plus breaks). This workshop is for consumers who have already decided to use the consumer-directed option and are ready to advertise and hire PAs. In addition, consumers with some hiring experience who want to improve their knowledge and skills in this area can benefit from this workshop.
- **Workshop IV: Supervising Personal Assistants—Session 6 & 7** (8 hours, plus breaks). This workshop is for consumers who have already hired PAs. The focus is on improving participants' communication skills so they are able to more effectively supervise their PAs.

Keep in mind that each workshop is not limited to only the consumers described above. People considering the consumer-directed option may want to learn about hiring and supervising before making a final decision. And those already supervising PAs can benefit from the skills practice in the earlier modules.

Since the sessions are designed sequentially, the activities build on one another. Workshops 2, 3 and 4 require participants to have completed certain prior activities. Instructions for integrating these into the workshop schedule are provided.

Timing

Regardless of the backgrounds of participants in each workshop, we recommend that instructors teach only one session per day. Sessions range from 3 hours 45 minutes to 4 hours, one is 4 hours 15 minutes. Instructors will always need to include at least one 15 minute break or perhaps, a longer lunch. Field tests showed that each module requires participants to expend significant physical and mental energy, and that most were unable to remain engaged beyond a few hours. *Some participants may have difficulty staying focused for the full sessions. Consider either splitting the sessions into two days or meeting from 10:00 a.m. to 3:00 p.m. and allowing an hour for a lunch break.* Spread training sessions out over several days or even weeks. In addition, the logistics of scheduling and transporting participants with limited mobility can be complex, putting additional strain on the training organization.

Instructors and Training Methods

The overall training approach in this curriculum is highly interactive and learner-centered. A number of participatory training methods—large- and small-group exercises, paired activities, interactive discussions, and role plays, among other activities—are used. This approach was found to be highly successful in the field tests of this curriculum.

For this approach to be most effective, we recommend that a team of at least two instructors—experienced adult educators, social workers with group experience, home care agency staff, paired with experienced consumers with disabilities—present the workshops. It is particularly important to have at least one of the instructors be someone who has personal experience with a disability, and that the training team be skilled in interactive, participatory training techniques. At least one instructor needs to be comfortable with performing and conducting role plays.

Overall Training Tips

- **Respect for privacy and individual differences:** The interactive approach of this curriculum involves a lot of personal sharing. Participants should feel free to control the amount of detail they provide—some will share a great deal, others only a little. Instructors will also encounter individual differences in the pace of learning.

- **Room setup, comfort, and time:** To maximize interaction and participation, instructors must take into account mobility and comfort issues when selecting a space and planning the training activities. Rooms must allow free movement of wheelchairs for pairings and other active techniques. Small-group work and large-group exercises that involve movement will require time for people to move around.
- **Invite request for assistance:** Participants should be reminded to ask for help if they need it to move around the room or get what they need.
- **Room temperature:** Controlling the room's temperature is very important, since some consumers' disabilities increase their sensitivity to temperature.
- **Breaks:** Some participants may tire from sitting in chairs or wheelchairs for extended periods or may be mentally exhausted from the intensity of the curriculum. Long breaks are a good idea. Also instructors should remain flexible, making decisions, when appropriate, to end the workshop or activity early and resume at the same point when the group meets again. We recommend no more than five hours of training per day, including lunch and other breaks.
- **Physical, Cognitive, and Learning Disabilities:** These types of disabilities may reveal themselves in the course of the training. This is especially true for reading- and writing-based activities. Instructors will need to make spontaneous decisions about the time to be spent on a given activity, the amount or depth of content to be taught, and the amount of verbal explaining and rereading necessary to ensure adequate learning by participants. For example, small-group work that requires writing may need to be changed to large-group work with an instructor writing on a flip chart page. Individual activities can also be done in pairs so that participants can support one another.
- **Homework Activities:** Homework is sometimes assigned to reinforce knowledge and skills or to prepare participants for the next session. Written homework can generate anxiety for participants with learning disabilities. Instructors should be prepared to provide alternate ways to complete assignments—such as small-group work with instructors or a discussion—that are not based exclusively on reading and writing.
- **Time-Saver Tips:** When time is running short, activities such as opinion polls, which are introductory conversational stimuli, can be omitted. This can save 20 to 30 minutes of attitude exploration before delving into a topic.

The Training Package

This instructor's manual consists of this introduction, an overview of each module, a detailed curriculum with activity guides, and handouts. In addition, class notes from the train-the-trainer course are included with each module. On the CD you will find eight folders: Seven session folders include the instructor's guide, handouts, and optional

presentation materials. An overview folder includes the Introduction, Curriculum Overview, and Training Notes that apply across the curriculum.

Each of the seven sessions' Trainer Guides has a summary page describing:

- Goal of the module
- Training methods and time for each activity
- Supplies and handouts needed
- Advance preparation that will help make the training run more smoothly

Detailed guides for each of the training activities follow the summary page. Each activity guide is composed of:

- Learning Outcomes
- Key Content
- Teaching Steps
- Teaching Tips (as needed)
- Teaching Options (as needed)

Learning outcomes are concrete, measurable behaviors that the participants should have adopted or be able to demonstrate by the end of an activity. These give the instructor a sense of why each activity is important and provide a basis for feedback regarding the effectiveness of the curriculum and the training.

Key content is the basic ideas and important points to be covered during the activity. This information is not to be read to participants but rather should be worked into discussions as the activity unfolds. If necessary, the instructor can summarize these points at the end of the activity—but, again, they should not be simply read aloud.

Teaching steps are guides to help the instructor logically move through each activity. A time estimate is provided for each activity and its parts, and when activities involve many steps or several different training methods (e.g., small-group work followed by large-group discussion), an estimate is suggested for each training step. However, instructors should also be mindful of the needs and interests of participants and adapt both the steps and the time required to meet those needs.

Teaching tips are based on experiences with field-testing this curriculum and provide suggestions for optimizing particular training steps. Teaching options are alternatives to suggested activities, often related to group size or time issues.

Teaching Materials, Supplies, and Equipment

This training requires a flip chart pad, easel, colored markers, masking tape, pens or pencils, handouts and extra blank paper for participants, card stock for table tents for names, and nametags. Instructors may also want an LCD projector. Each activity guide indicates where flip charts or other visual materials should be used.

Visual aids are important to all trainings. They help to focus participants' attention and make the training more engaging. When using visual aids, whether flip charts, slides, or handouts, keep in mind the following:

- **Write large:** Printing on flip chart pages should be large and clear. Likewise, with typed slides, the Arial font at a minimum size of 14 points is recommended. In field tests, many participants had difficulty seeing type smaller than 14 point when projected on a screen.
- **Provide handouts:** All presentation materials, including handouts, are in the back section of the curriculum. If new handouts are created, it is best to keep each page simple (lots of white space) and to use large fonts.
- **Build a resource guide:** One desired outcome of the training is for each consumer to build a resource guide – called “My Personal Papers” in the handouts. Every participant should have a three-ring or other binder to keep their materials for future reference. Only the handout(s) for a particular activity should be distributed during a session so that participants build their resource guides over time.

Evaluation and Follow-Up

During the workshop, it is important to regularly check with participants about key issues such as their comfort and energy levels, their comprehension of the information being discussed or presented, and its relevance to participants' needs. This can be done through ongoing verbal check-ins (e.g., How is everyone feeling? Do we need a break now?). Also, at the end of each day, instructors should conduct a quick activity to assess participants' reactions to the materials and approaches. A final closing activity with a simple evaluation is included with each module's activity guide.

In terms of evaluating the impact and effectiveness of this curriculum, the key mechanism is following up with participants, to see how successful they are in employing and supervising their PAs. It is important to follow up after each workshop to assess who is ready for the next one or what additional input or assistance consumers might need to carry out key tasks.

Follow-up need not be limited to continuing the training nor does it end when the three workshops are completed. One striking recommendation from the field tests was for ongoing support groups where participants could continue to share lessons from their

own experiences and address challenges. Trainers may also use workshop materials in one-on-one coaching sessions with consumers.

Feedback

PHI would appreciate your feedback on this curriculum. Please contact Maureen Sheahan, Midwest Training and Organizational Development Specialist, at msheahan@phinational.org with comments or questions.

Employing, Supporting and Retaining Your Personal Assistant

Workshop Series Overview

Workshop I: Session 1 – Living the Life You Want: *Exploring Your Needs and Preferences*

Goal

- To increase consumers' self-awareness of their personal assistance needs and preferences in order to help them effectively screen, hire, and supervise their personal assistants (PAs).

Time

4 hours, plus breaks

Activities	Teaching Methods	Time
1.1 Welcome	Large-Group Exercises, Discussion	45 minutes
1.2 Opinion Poll 1	Large-Group Exercise	30 minutes
1.3 My Ideal (or Perfect) Day	Presentation, Individual Exercise, Discussion	45 minutes
1.4 Tools to Identify Your Personal Preferences and Plan Your Assistance Needs	Large-Group Exercise, Individual Exercise	75 minutes
1.5 Opinion Poll 2	Large-Group Exercise	30 minutes
1.6 Closing	Large-Group Exercise	15 minutes

Workshop II: Session 2 – Understanding the Consumer-Directed Option: Is It Right for You?

Goal

- To help participants explore the concepts of choice, preference, rights, and responsibilities in obtaining personal assistance services for themselves.

Time

3 hrs, 45 minutes, plus breaks

Activities	Teaching Methods	Time
2.1 Welcome	Large-Group Exercise	30 minutes
2.2 The Ideal (or Perfect) Personal Assistant	Individual Exercise, Discussion	45 minutes
2.3 Opinion Poll 3	Large-Group Exercise	15 minutes
2.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model	Small-Group Brainstorming, Discussion	60 minutes
2.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities	Discussion	45 minutes
2.6 Closing	Discussion	30 minutes

Workshop III: Finding and Hiring Personal Assistants

Session 3 – Finding Personal Assistants

Goal

- To increase participants' knowledge and skill in recruiting and pre-screening personal assistance staff, prior to beginning the interview process.

Time

4 hours, 15 minutes plus breaks

Activities	Teaching Methods	Time
3.1 Welcome	Large-Group Exercise	30 minutes
3.2 Opinion Poll 4	Large-Group Exercise	20 minutes
3.3 Overview of the Hiring Process	Interactive Presentation	15 minutes
3.4 Snapshot of Me and My Rough Schedule	Pairs Work, Discussion	60 minutes
3.5 Finding Personal Assistant Candidates	Discussion	20 minutes
3.6 Creating an Advertisement	Discussion, Pairs Work	50 minutes
3.7 Telephone Pre-Screening	Discussion, Large-Group Exercise	45 minutes
3.8 Closing	Discussion	15 minutes

Session 4 – Preparing to Staff: Making a Staffing Plan, Developing a PA Schedule, and Interviewing Candidates

Goal

- To assist participants in determining their staffing needs and in developing the communication skills needed to effectively interview potential candidates.

Time

4 hours plus breaks

Activities	Teaching Methods	Time
4.1 Welcome & Homework Review	Large-Group Exercise	30 minutes
4.2 Preparing a Job Description	Discussion, Individual Exercise	30 minutes
4.3 Making a Staffing Plan & Personal Assistance Schedule	Discussion, Individual Exercise	45 minutes

4.4 The Interview Process	Interactive Presentation	20 minutes
4.5 Interviewing Skills	Interactive Presentation, Pairs Work, Discussion	45 minutes
4.6 Role Play of an Interview	Role Play, Discussion	60 minutes
4.7 Closing	Discussion	10 minutes

Session 5 –Hiring Personal Assistants

Goal

- To provide participants with the knowledge and skills needed to evaluate final candidates, make job offers, finalize work agreements, and politely turn down those who are not qualified.

Time

3 hours, 45 minutes plus breaks

Activities	Teaching Methods	Time
5.1 Welcome & Homework Review	Discussion, Large-Group Exercise, Interactive Presentation	30 minutes
5.2 Checking References	Discussion, Pairs Work	45 minutes
5.3 Making an Offer	Interactive Presentation, Pairs Work, Discussion	30 minutes
5.4 Sealing the Deal: Developing Work Agreements	Discussion, Individual Exercise	60 minutes
5.5 Overview of Consumer-Directed Program Requirements	Interactive Presentation	30 minutes
5.6 Closing	Large-Group Exercise, Discussion	30 minutes

Workshop IV: Supervising Personal Assistants

Session 6 – Introduction to Supervisory Skills:

Goal

- To introduce consumers to the role of supervision in the consumer-directed model, and to help consumers begin developing active listening skills that are essential to effective supervision.

Time

4 hours, plus break

Activities	Teaching Methods	Time
6.1 Welcome and Homework Review	Large-Group Exercise	30 minutes
6.2 Great, Not-So-Great Supervisors	Interactive Presentation, Small-Group Work, Discussion	30 minutes
6.3 Responsibilities of Supervisors	Large-Group Exercise	15 minutes
6.4 Introduction to the Coaching Approach to Supervision	Large-Group Exercise, Interactive Presentation	30 minutes
6.5 Active Listening: Non-Verbal Listening	Interactive Presentation, Role Play, Discussion	30 minutes
6.6 Active Listening: Effective Verbal Communication	Pairs Work, Discussion	30 minutes
6.7 Active Listening: Paraphrasing and Asking Open-Ended Questions	Interactive Presentation, Role Play, Large-Group Exercise, Pairs Work, Discussion	60 minutes
6.8 Closing	Discussion	15 minutes

Session 7 – Supervisory Skills II: Self-Awareness, Self-Management, and Constructive Feedback

Goal

- To introduce consumers to three basic skills necessary for effective supervision: self-awareness, self-management, and giving constructive feedback.

Time

4 hours, plus breaks

Activities	Teaching Methods	Time
7.1 Welcome & Homework Review	Discussion	30 minutes
7.2 Awareness of Self and Others in Supervision: Blocks to Listening	Interactive Presentation, Role Play, Small- Group Work, Discussion	60 minutes
7.3 Self-Management: Pulling Back in Supervisory Relationships	Role Play, Discussion, Interactive Presentation, Brainstorm, Pairs Work	60 minutes
7.4 Giving Constructive Feedback	Brainstorm, Discussion, Pairs Work	60 minutes
7.5 Closing	Discussion	30 minutes

Note: Instructors may want to add additional time to incorporate a closing celebration.